



Getting Started with NeatCloud® + NeatMobile®

Neat transforms paper and electronic documents into organized digital files that are easy to find, use, and share. NeatCloud + NeatMobile make your information even more active and accessible.

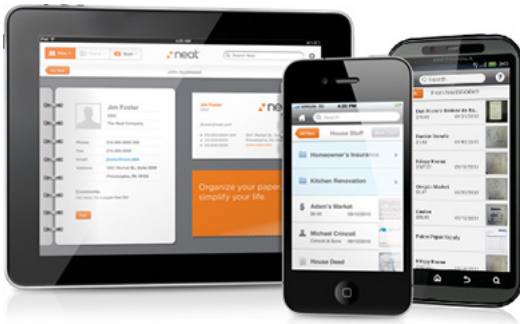


Getting Started with NeatCloud® + NeatMobile®

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ULTIMATE SECURITY FOR ALL YOUR FILES

When your documents are in NeatCloud, they're not only synchronized between your various devices, they're securely backed up on our servers. We take security seriously – NeatCloud uses SSL encryption, and protects your files with the same encryption standard used by most banks to secure customer data.



USE NEAT ON YOUR MOBILE DEVICES

Use the Neat app for iOS or Android to transform your smartphone or iPad into a pocket-sized Neat scanner – and another way to access your files.

[Get the app from iTunes](#) | [Get the app from Google Play](#)

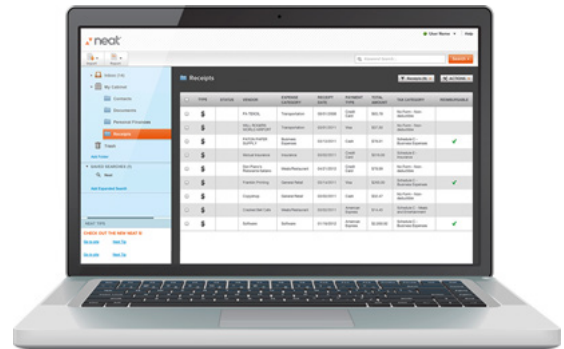
[LEARN HOW TO USE NEAT ON MOBILE](#)

USE NEAT ON THE WEB

Sign in to NeatCloud from any computer, and securely access all of your files through the web – with no software required.

[Sign in to NeatCloud](#)

[LEARN HOW TO USE NEAT ON THE WEB](#)



CONNECT EVERYTHING

NeatCloud connects your Digital Filing System across multiple computers and mobile devices.

[LEARN HOW TO SYNC WITH NEAT SOFTWARE](#)

Signing in to NeatCloud

Access NeatCloud on the web or your mobile device with the Username and Password you created when signing up for Neat.



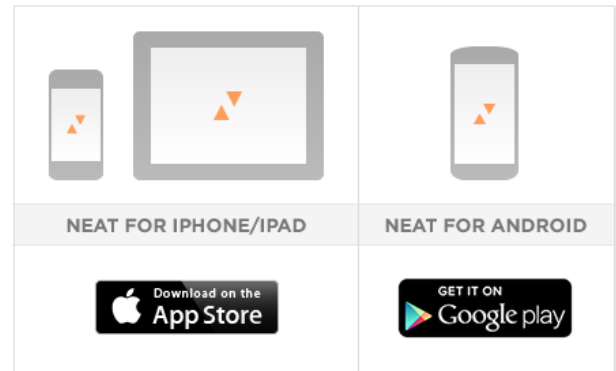
Using Neat on Mobile Devices

Be Neat everywhere – with NeatMobile. With the Neat app, your important files are always close at hand and available wherever you go.

DOWNLOADING THE APP

NeatMobile lets you access Neat from your smartphone or iPad via the Neat app. Download the app, then sign in on your device with your NeatCloud account.

[Get the app from iTunes](#) | [Get the app from Google Play](#)



Scan

YOU GET THE PICTURE

NeatMobile lets you use the camera on your mobile device to scan items into Neat. Just select "Scan," choose an item type, and take a picture of the item you'd like to scan... and Neat will do the rest!

After taking a photo, it will go to your Queue for processing before appearing in your Inbox.

NEAT RECOGNIZES EVERY ITEM AS A RECEIPT, CONTACT, OR DOCUMENT



Receipts

Neat instantly captures information like Vendor, Date, Amount, and Payment Type.



Contacts

Neat transforms business cards into digital contacts, instantly recognizing all of the contact information



Documents

Neat runs Intelligent Text Recognition on every word of every document, so you can keyword search anything.



Queue

ITEMS IN QUEUE

Your Queue is divided into two sections – Processing Queue and Upload Queue. Your Upload Queue shows items awaiting upload from your mobile device. The Processing Queue shows items that are being processed in the cloud, where they undergo Intelligent Text Recognition.

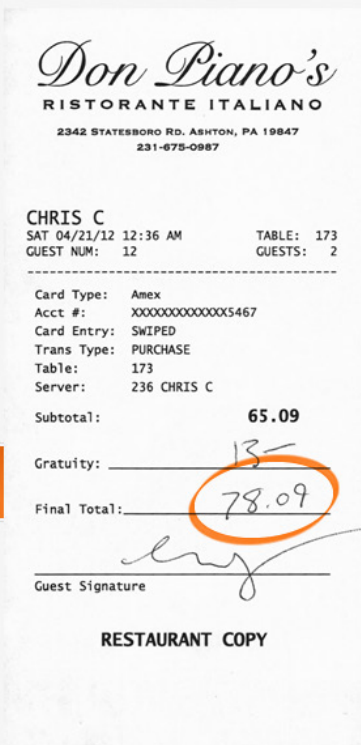
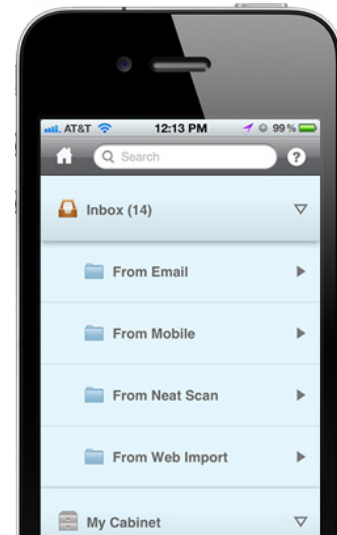
Once an item is finished processing, it will appear in your Inbox.

Files

VIEWING YOUR INBOX

Your Inbox is divided into the following folders: From Email, From NeatMobile, From NeatScan, and From Web Import. Items you send to Neat will be put into the appropriate folder automatically so they're easy to find.

Scans you take with your mobile device will appear in the “From NeatMobile” folder of your Inbox when they're done processing.



NeatVerify®

Mobile Data Verification Service for NeatCloud

NeatVerify is an optional service that ensures the highest possible accuracy for your mobile scans of receipts and business cards, using a team of specialists to ensure key information is read and extracted correctly. It's perfect for faded receipts or handwritten totals, such as a restaurant bill with an added tip.

You can choose to send an item to NeatVerify right after you scan it by turning NeatVerify “on” in the review screen.

Total Amount: \$78.09

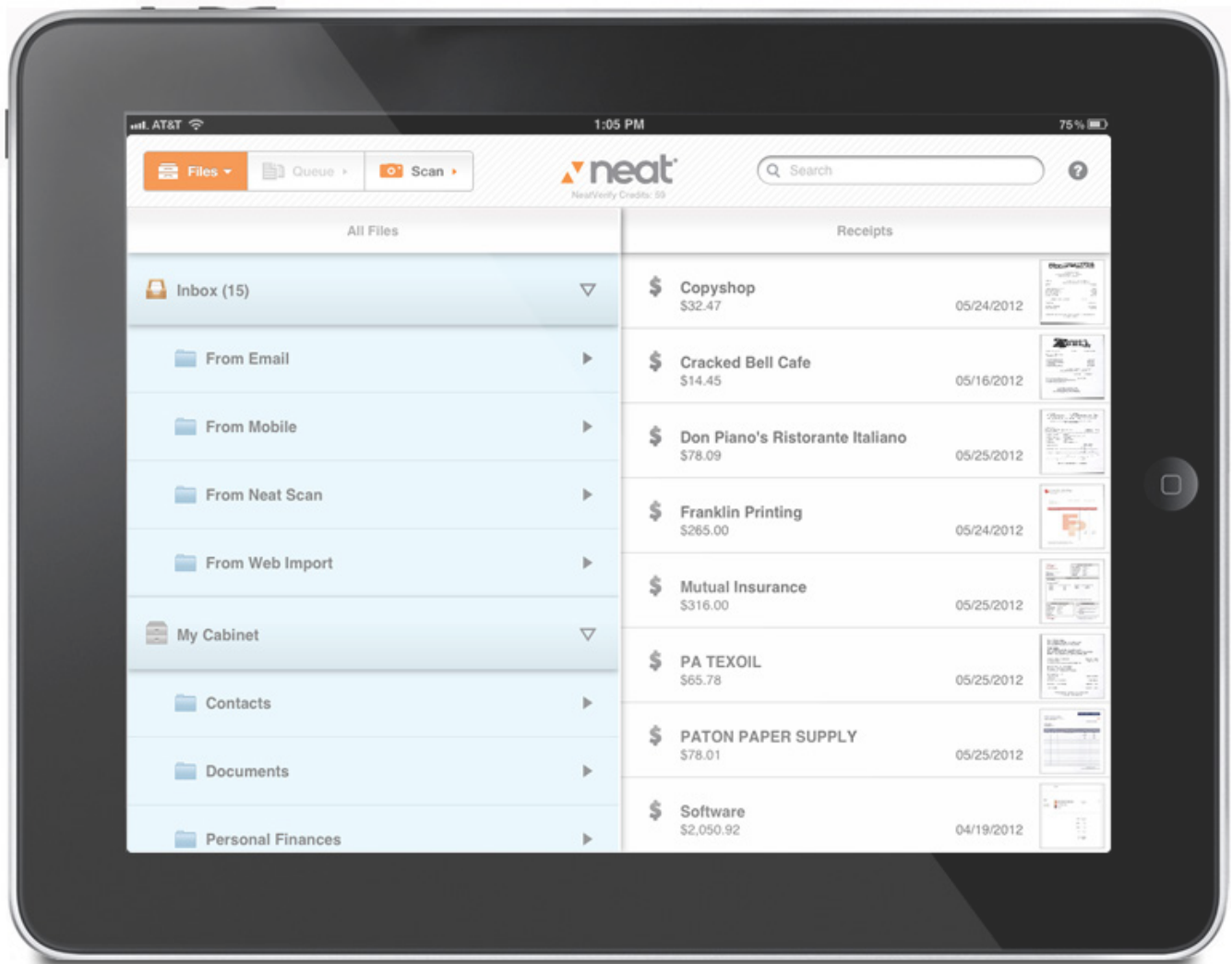
✓ GET IT VERIFIED

**30
FREE
CREDITS**

Your NeatCloud account comes with 30 FREE NeatVerify credits, so give it a try! NeatVerify comes in monthly plans.

VIEWING AND SHARING YOUR FILES

All of your files and folders will be in NeatMobile just like they appear on your computer. You can even share items directly through the Neat app to easily collaborate with others.



Browse files and folders

Browse your folders and see every item quickly. Tap an item to take a closer look.

View items

View the original document, as well as the information extracted by Neat's Intelligent Text Recognition.

Share your items

Select the item you'd like to share, choose Share from the menu, and an email will be created with your chosen item attached in PDF form.

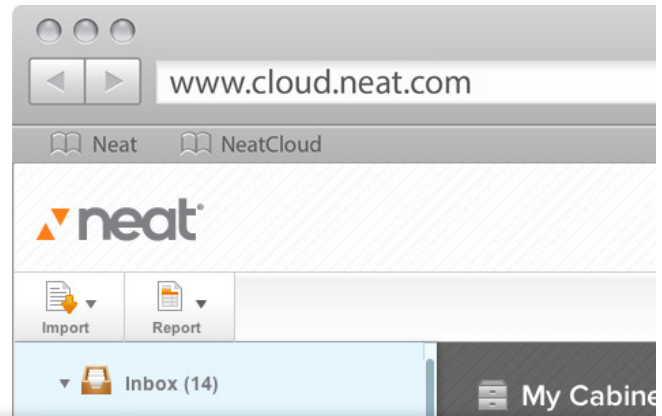
Using Neat on the Web

If you can get to the internet, you can get to your Neat files. Sign in to your NeatCloud account from anywhere at cloud.neat.com.

SIGNING IN TO NEATCLOUD

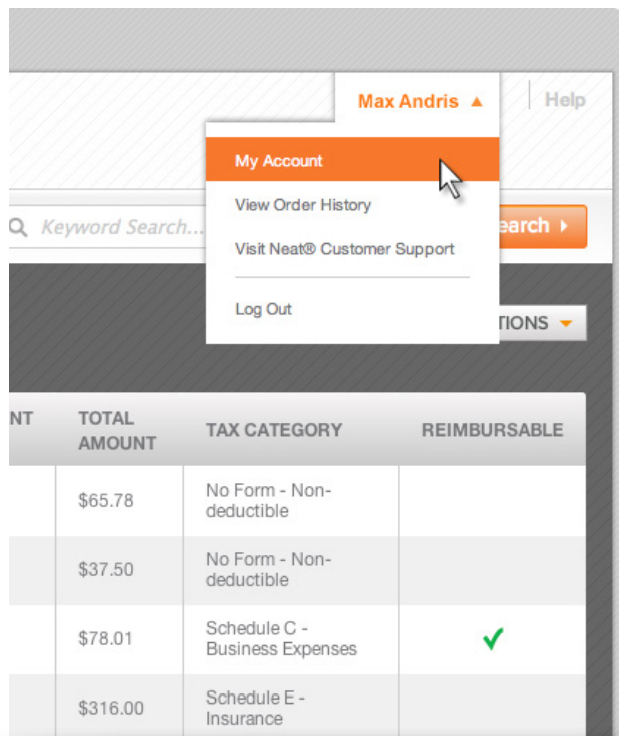
When you go to cloud.neat.com, you'll be asked to sign in with your username and password. Use the same account information you created when you originally signed up for NeatCloud. You'll be able to view, edit, and move items – just like you do with your Neat software.

 [Sign in to NeatCloud Online](#) ▶



MY NEATCLOUD ACCOUNT SETTINGS

The first time you sign in to NeatCloud, it's a good idea to get familiar with your account settings. Access your account info by clicking your name in the upper right-hand corner of the screen and choosing "My Account" from the dropdown menu.



Personal Info

View or edit your basic information. *Please note that your email address is used for your account username and cannot be changed.*



NeatCloud Subscription Plan

This section displays your current NeatCloud subscription type.



Multiple Users

One of the great features of NeatCloud is having multiple users on an account. This section lets you manage who else has access to your account.



NeatVerify Plan

Manage your NeatVerify plan here. This premium service ensures the ultimate accuracy for your mobile scans. [Learn more about NeatVerify.](#)



NeatCloud Email

Forward emails and attachments directly into your Neat account by sending them to the @neatcloud address given here. [Learn more about Email In.](#)



Expanded Search

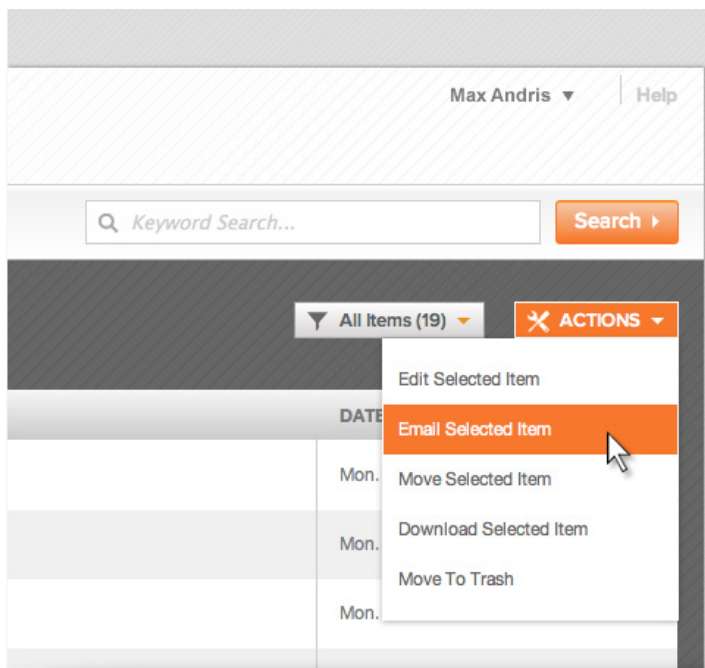
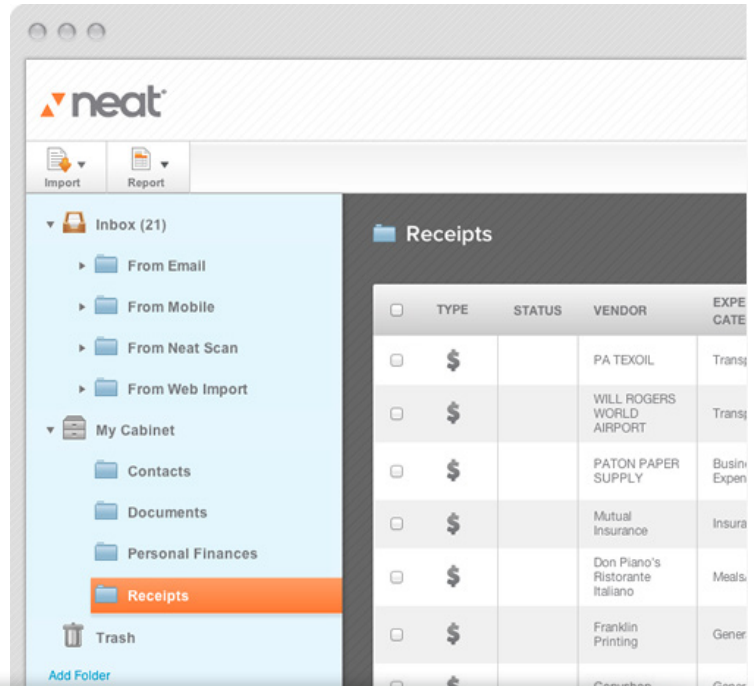
NeatCloud lets you connect your Evernote, Dropbox, and Google Docs accounts so you can search everything at once – through Neat. [Learn more about Expanded Search.](#)

THE NEATCLOUD WEB INTERFACE

Using the interface of cloud.neat.com is easy and intuitive. Even if you're not familiar with Neat's software setup, you'll have no problems being organized with NeatCloud.

Folders

NeatCloud uses the same folder tree structure as our desktop software. Because of the Sync function, your files and folders on NeatCloud will be identical to those in your Neat desktop software, and vice versa.



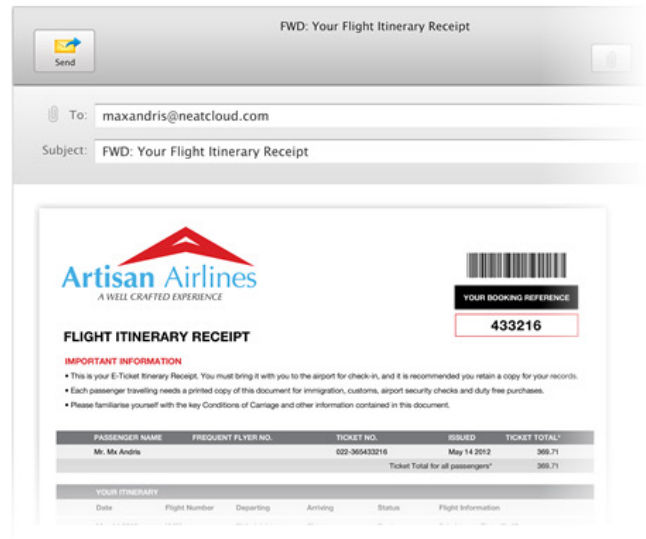
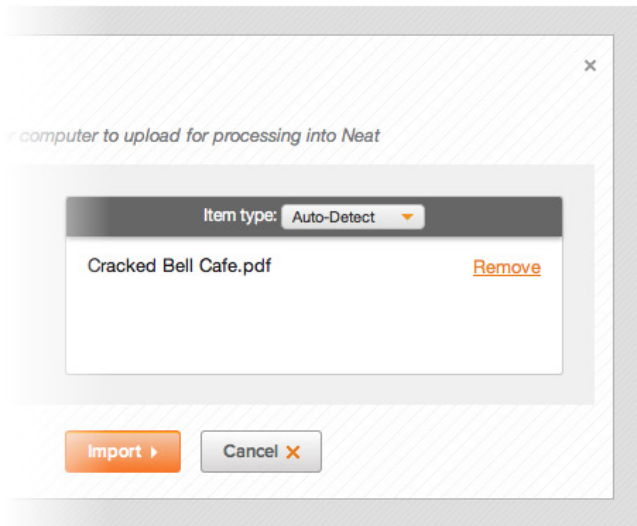
Actions

The Actions menu lets you create and delete items, move or download files, share files and folders, and more. The options presented in this menu will vary depending on whether you are viewing a file or folder.

Note that changes you make in NeatCloud will be reflected on your desktop and other Neat installations when you sync. For example, an item you move to the trash in NeatCloud will also be moved to the trash in your Neat software.

ADDING ITEMS TO NEAT WITH NEATCLOUD

NeatCloud gives you some new ways to get items into Neat, making it easier than ever before to build up your Digital Filing System.



Importing files

The Import button lets you browse your computer for items to add to Neat. You can even drag and drop files to quickly add to your Digital Filing System. Files you import will undergo Intelligent Text Recognition in the cloud, then appear as new items in the "From Web Import" folder of your Neat Inbox. **It's one of the fastest, simplest ways to add files to Neat.**

Email In

When you sign up for NeatCloud, you'll be provided an @neatcloud email address. Anything you forward to this address, with or without attachments, will appear in the "From Email" folder of your Neat Inbox. It's perfect for dealing with digital receipts and other important emails. **You can find your @neatcloud email address in the "My Account" section of NeatCloud.**



NeatScan®

Bulk Scanning Service for NeatCloud

Get a head-start with NeatScan

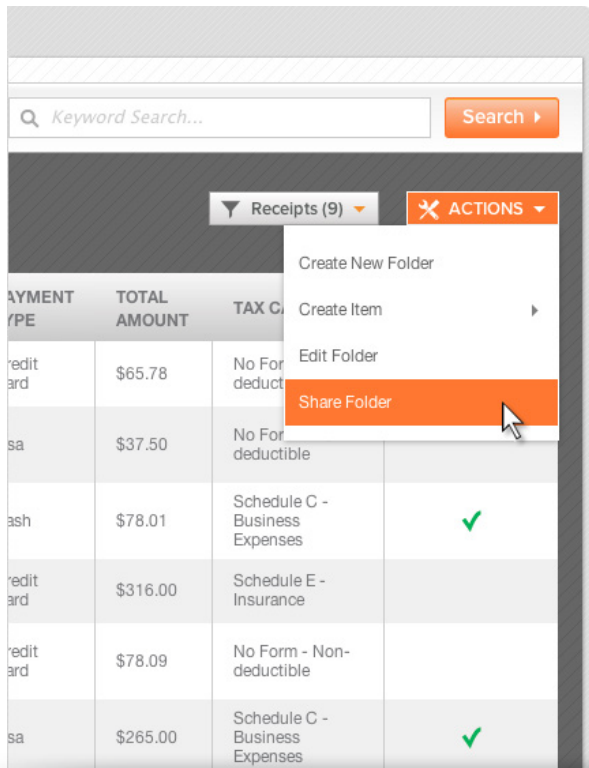
Have lots to scan, and no time to do it yourself? Let us give you a hand! With NeatScan, you send us what you want scanned and we do the work for you, adding it to your account via NeatCloud.

[LEARN MORE ABOUT NEATSCAN](#)



COLLABORATING THROUGH NEATCLOUD

NeatCloud gives you more ways than ever to share files and work with others, making it the ultimate tool for collaboration.



Sharing an item

You can share individual items with ease through NeatCloud. Select the item you want to share, then choose "Email Selected Item" from the Actions menu.

Sharing a folder

You can use NeatCloud to share entire folders with other people at any time – even if they don't have NeatCloud. They'll get read-only access to your files, and will be able to comment on items.

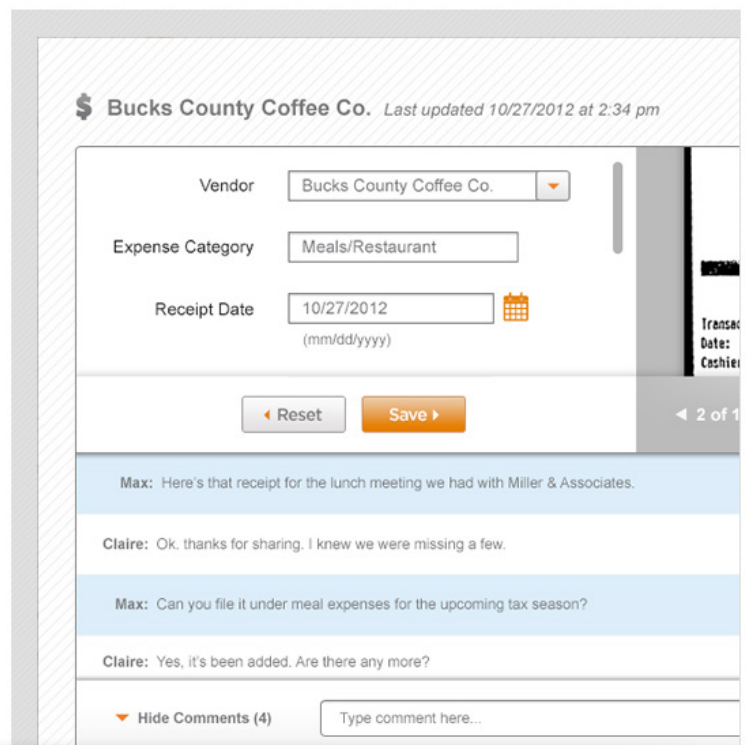
Simply select the folder you'd like to share, and choose "Share Folder" from the Actions menu.

Commenting

When you share a folder, each user can add comments to the items in that folder. Comments can be added when viewing an item.

Adding users to your account

It's possible to add users to your NeatCloud account, giving complete access to everything in your Digital Filing System. [Manage additional users in your Account Settings.](#)



CREATE EXPENSE REPORT FROM FOLDER
 Use a folder to create an expense report from the contents of that folder

Name
 Home Improvement

Note

Your report will be saved in the same folder you used to create it.

Create Report Cancel

CREATING EXPENSE REPORTS

To create an expense report in NeatCloud, begin by placing all items you'd like included in the report into a single folder. Then use the "Report" button to create your report.

Your report will be saved in the same folder you used to create it. You'll also have the option to instantly download your report to your computer..

SEARCHING EVERYWHERE

Finding items is easy with NeatCloud. Start with the basic Search bar – enter a term in here, and Neat will search your entire Digital Filing System for matching terms.

Saved Search

When you perform a search in NeatCloud, you'll see a Save Search button. When you save a search, it will appear beneath your folder tree, in the left-hand column of your screen.

Keyword Search... Search

SAVED SEARCHES (2)

Expenses

Receipt

Add Expanded Search

CREATE AN EXPANDED SEARCH
 Connect the services you'd like to search and fill in the fields.

Include Files From:

EVERNOTE Connect

Google docs Connect

Dropbox Connect

Clicking "Connect" will open a new window where you will be prompted to log in to your external account.

Name
 Expenses

Keyword(s)
 Receipts

Description

Create Cancel

Expanded Search

You can connect your Evernote, Google Docs, and Dropbox accounts to NeatCloud, and search them all through Neat – this is known as Expanded Search. Choose Add Expanded Search under your Saved Searches to get started.

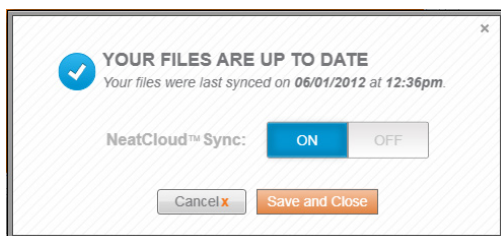
Note that the first time you add a third-party app to an Expanded Search, you'll need connect that service to Neat. This is done by selecting the service and clicking "Connect."

Syncing with Neat Software

NeatCloud sets your Digital Filing System free with the power of the cloud. No matter how or where you access your files, they'll always be up to date.

BRINGING IT ALL TOGETHER

The backbone of NeatCloud is the Sync function. No matter how you access Neat, you'll have the latest versions of your files.



SYNCING FOR THE FIRST TIME

Use the Sync button in your Neat desktop software to initiate your first sync. If you have a large library of files, this first sync could take some time to complete. Once Sync is on, it will work behind the scenes to keep your files up to date.

SECURE BACKUP FOR YOUR IMPORTANT FILES

NeatCloud backs up everything you have in your Digital Filing System, and protects your information and privacy with the same encryption technology used by most major banks.



MULTIPLE DESKTOPS

NeatCloud works to keep your information in sync across multiple computers, even if they use different operating systems.

Install Neat software, sign in to your account, and use Sync to access the same up-to-date files on your PC at work, your Mac at home, and your laptop on the road!